



**PROJECTDOX PROCESS**  
**Introduction**



**W**elcome to Department of Planning & Zoning’s Electronic Plan Submission and Review process, known as Project Dox! This powerful web-based collaboration and automated workflow tool enables better and more effective plan reviews for ECP’s, SDP’s and Final Plans. The rich built-in capabilities of the ProjectDox software, in addition to our custom designed modifications, allows for secure collaboration and markup of plans. At the same time, it streamlined the review process and improved communications and review accuracy. This new tool also significantly reduces the amount of paper, printing, and storage costs, as well as travel to the submit the plans.

If you have any questions please feel free to contact a member of the PDox Development team listed in the Introduction Tab of the Help & Resources Link. You can also send emails to [helpdpzpdox@howardcountymd.gov](mailto:helpdpzpdox@howardcountymd.gov). This document provides an introduction to Project Dox. Please see the video tutorials for help on more specific PDox functionality.

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**T**hanks for joining us in using ProjectDox. A system that fundamentally changes the way the department conducts business—moving from a paper-based process to a paperless process. Subdivision and site plans are now submitted and reviewed electronically, and communication is enhanced through a digital workflow process. The new system provides better and faster plan reviews enabling enhanced communication among County agencies and between the agencies and our customers. At the same time, it generates much less paper and enhances access by all via the web. There are three main parts of the system: 1) e-forms, 2) workflow, and 3) electronic review. E-forms (electronic forms) are web-based application forms. Instead of applicants filling out a paper form, they fill out a form directly on DPZ's website.

The second part of the system—workflow— is a pre-designed communication system that automatically sends e-mails to the appropriate agency and staff at the appropriate time during the plans review process. Participants in the workflow are notified of their task, given the opportunity to work on it, and then “check-off” that it's been completed. The process then moves forward based on built-in rules. It is a dynamic system allowing many agencies to work on the same project at the same time. The various stages of all projects will be at reviewer's fingertips allowing them to determine the current status of the project and any associated deadlines.

The third part of the system—electronic review— is perhaps the most valuable. Rather than delivering 26 copies of a multi-sheet site development plan to all the County and State agencies, applicants will just upload the plans to the web from their work places. Plans are then reviewed on the computer screen by multiple agencies at the same time. Review comments are written directly on the electronic plan and the applicant then reviews final comments by just logging into the system. Review agencies can view other agency comments as well, all on the same plan. Subsequent plan submittals are then uploaded based upon any comments received. Versions of the plan are automatically compared as the software highlights any differences. This results in better and more efficient reviews.

Since the system is web-based, anyone with log-in rights can participate and there is no need for special software loaded on each machine. The public can also be granted access to see plans, reports, and staff comments. All documents associated with the plan, such as traffic and forest conservation studies are also uploaded and viewable as part of the plan submission. DPZ is one of the first planning departments in the country to implement this system. This document provides an introduction to ProjectDox. Please see the video tutorials for help on specific PDox functionality.

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## Primary ProjectDox Definitions and Glossary

**Application:** the first form completed by a plan applicant, available on the ProjectDox home screen. Once filled out, the “process” is launched and the workflow begins.

**Brava Viewer:** This electronic “viewer” application operates within ProjectDox; it allows staff to view and markup CAD files, pdf, word and excel documents, Jpegs and many other files on which may be uploaded. This application provides layers on top of the original files on which marks and drawings may be placed. Please note that since this is a viewer, edits cannot be made to the original drawings and documents. Most of the work during the review process will take place in the Brava Viewer. All DPZ and SRC agency staff as well as the applicant will utilize the Brava Viewer during the review process.

**Checklist:** The checklist is filled out by the applicant. It is the same as the DLD and DED paper versions, but more “dynamic” in that it will open or expose a particular applicable section based on answers to targeted questions. The checklist process ends when the applicant has uploaded all electronic plans, associated reports and documents, and when the DLD & DED Intake Reviewers confirm that all information and the computed fees are correct.

**DED: Development Engineering Division,** Howard County Dept of DPZ

**DED Estimates:** A Microsoft Excel document where DED fees and construction estimates are input and calculated.

**DLD: Division of Land Development,** Howard County Dept of DPZ

**DLD Estimates:** A Microsoft Excel document where DLD submission fees are input and calculated. These also include surety calculations at the end of the review process.

**E-form:** Formerly paper, e-forms are Web-based electronic forms used throughout the plans review process & include, but are not limited to, applications, checklists, transmittal, approval, and procedural forms.

**Task:** Applicants and review staff alike will receive tasks (accompanied with a notification email) when the ProjectDox workflow reaches points when action is required by that particular participant. Tasks include, but are not limited to, filling out forms and checklists, verifying information, uploading documents, and reviewing documents.

**Workflow:** The process which any project must go through from initial application request to approval

### STAFF Roles:

**DED Intake Reviewer:** Verifies that the application and checklist are complete for all DED items.

**DLD Intake Reviewer:** Verifies that the application and checklist are complete for all DLD Items.

**DLD Reviewer:** DLD Project Manager assigned to the project.

**Supervisors:** The chief of an agency or division or their designee, capable of final approval on behalf of that division or agency.

**SRC Agency:** Any agency involved in the plan review process outside of Howard County Department of Planning and Zoning. Each of these agencies contain supervisor and reviewer roles.

**Project Coordinator:** This role serves as project administrator for each ProjectDox project (each SDP, for example). All Help requests are coordinated and resolved by the Project Coordinator



https://pdox.howardcountymd.gov/ProjectDox/ViewProjects.aspx?SessionID=b5242742-51ec-4a1f-9507-5a346830e751&TempPassword=False&markup\_url=

**ProjectDox** System Administrator  
Howard County, MD

Back Forward Projects Profile Logout Admin

Active projects for Amit Sharma (asharma@howardcountymd.gov) Create Project View Archived Projects

Press Enter to search:

Project	Options	Description	Owner	Status
<a href="#">24-0000-D</a>		West End Water Main	<a href="#">Amit Sharma</a>	Completed
<a href="#">ADMIN PROJECT</a>		This Project is used for the Administration & Reporting of the Plan Review Process	<a href="#">Gregory Linkous</a>	Active
<a href="#">DECP Training</a>		Brava Viewer Test	<a href="#">Amit Sharma</a>	Active
<a href="#">DED Training</a>		Brava Viewer Test	<a href="#">Amit Sharma</a>	Active
<a href="#">DLD Training</a>		Brava Viewer Test	<a href="#">Amit Sharma</a>	Active
<a href="#">Hickory Glenn</a>		Water Main Extension	<a href="#">Kin Siew</a>	[None]
<a href="#">INITIAL TEST PROJECT</a>		TESTING PROJECTDOX INSTALLATION	<a href="#">Support Avolve</a>	Active
<a href="#">Perceptive Software Demo</a>		Demo Project for Perceptive Software	<a href="#">Gregory Linkous</a>	Active
<a href="#">Presub Community Meetings for Cond Use or Zon. Map Amend.</a>		To fill out form for presub meeting for Cond Use or Zon. Map Amend - DO NOT DELETE	<a href="#">Jeff Bronow</a>	Active
<a href="#">Presubmission Community Meetings for Infill</a>		To fill out form for presub meeting for infill development - DO NOT DELETE	<a href="#">Jeff Bronow</a>	Active
<a href="#">Research Training</a>		Brava Viewer Test	<a href="#">Amit Sharma</a>	Active
<a href="#">SDP Applications - Anonymous</a>		This Project is used for managing the SDP Application Process	<a href="#">Jeff Bronow</a>	Active
<a href="#">SDP Development</a>		for creating the SDP process - DO NOT DELETE	<a href="#">Jeff Bronow</a>	Completed
<a href="#">SDP-09-999</a>		Wake Forest	<a href="#">Jeff Bronow</a>	[None]
<a href="#">SDP-09-FEB19</a>		Manual test 2	<a href="#">Heather Pandullo</a>	[None]

Page 1 of 2 (21 items)

Upon logging in, a you will see a full list of projects with option icons, descriptions, and project status . Hovering the mouse over the icons will reveal more information.

For instance, notice the color of the notes “notepad”- yellow indicates that notes exist within this project and hovering the mouse over the notepad will reveal that there are 3 topics and notes for this project.



https://pdox.howardcountymd.gov/ProjectDox/ViewProjects.aspx?SessionID=b5242742-51ec-4a1f-9507-5a346830e751&TempPassword=False&markup\_url=

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← Back Forward → Projects Profile Logout Admin

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Navigation:

Page 1 of 2 (21 items)

Notice that this is only page 1 of 2 for the person logged in

Status of the individual projects tells you exactly where your projects stands:

- Intake Review
- In Review
- Review Complete



https://pdox.howardcountymd.gov/?SessionID=&ProjectID=zvvtJKLWGjh1B9%2bVyeqWBg%63d%63d - Project...

# ProjectDox

## Howard County, MD

SDP-10-028

File (Project) Number

- Back
- Forward
- Projects
- Profile
- Logout
- Task List
- Info
- Notes
- Email
- Edit

Expand current | Collapse

F-Oct 4

Main Contact:

Expand current | Collapse

- F-Oct 4
  - Plat
  - Road and Supplemental Drawings
  - Water and Sewer Drawings
  - Water and Sewer Correspondence
  - Exhibits
  - Reports
  - Checklists and Estimates
  - Waivers
  - Developers Agreements
  - Redlines
  - Reviewer Correspondences
  - Applicant Correspondences
  - Signed PDF

Folders where documents/drawings will be stored. Most of which are self-explanatory.

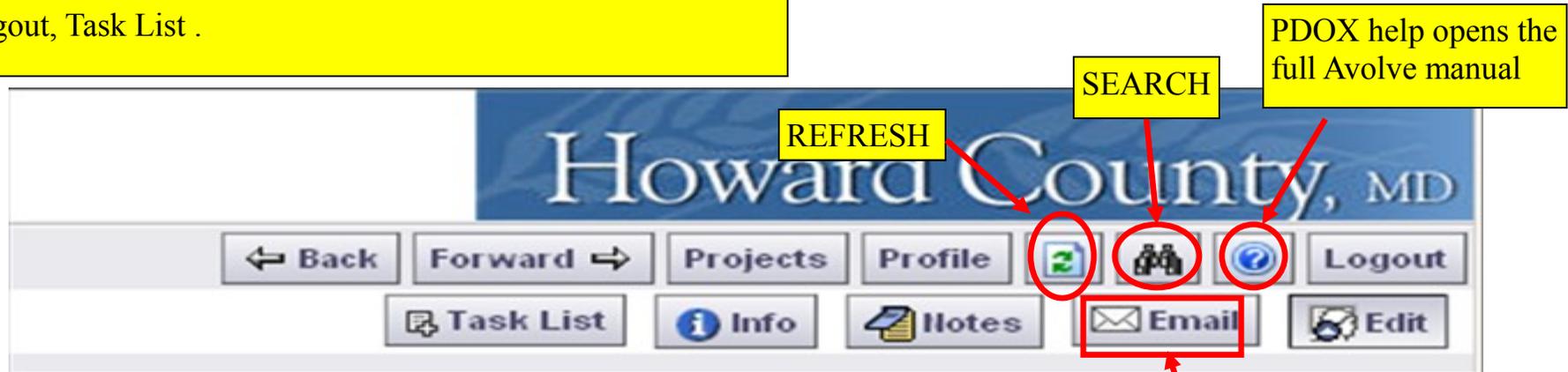
Project Name:	SDP-10-028
Description:	Ilchester Heights
Project Image:	No image exists
Location:	
Contact:	
Contact's Email:	
Phone:	
Cell Phone:	
Pager:	
Project Owner:	<a href="#">Lisa Kenney</a>
Owner's Email:	<a href="mailto:lkenney@howardcountymd.gov">lkenney@howardcountymd.gov</a>
Project Admins:	Gregory Linkous,Amit Sharma,Jeff Bronow,John Bussiere,Lisa Kenney,Manesh Pillai
Status:	Intake
Status Info:	
Project Start/End:	Start: 10/7/2009 5:13 PM   End: 4/7/2010 5:13 PM
Pass-Through:	.html,.htm,.wmv,.avi
Incoming Files:	Fax:   Email: <a href="mailto:271@pdox.howardcountymd.gov">271@pdox.howardcountymd.gov</a>
Versioning:	Enabled for this project

1st screen you will see when you open up a specific project. Here you can view basic project information:

- Project Name: (File Number)
- Project Owner and Owner's Email (this is the Intake Coordinator for DPZ)
- Status of the Plan
- Project Start Date
- Project Email Address (if you are sending emails to staff, etc. & would like to CC the file, you would use this email address, not necessary if sending email within PDox. See addendum for details.)



It's helpful to remember that the items at the top of the page will perform actions and provide information...as seen here, some of the labels are self-explanatory, such as Back/Forward, Logout, Task List .



*NOTE: Other buttons may or may not be visible on your bar, depending upon the roll you have (Project Administrator, System Administrator, Reviewer) for a particular project/plan.*

Another button will allow you to send TEAMMAIL email to users you select from various groups—you do not need to exit PDOX to send email to users or applicants.



**F-Oct 4**

Main Contact: [Workflow Portals] [Info] [Notes] [Email] [Edit]

Expand current | Collapse | F-Oct 4 TEST

**F-Oct 4**

- Plat
- Road and Supplemental Drawings
- Water and Sewer Drawings
- Water and Sewer Correspondence
- Exhibits
- Re
- Ch
- Wa
- De
- Re
- App
- Slip

**Project Info** **Reports**

Available reports:

View:	Report Name:	Report Type:	Report Description:
	Current Project - All Emails Sent Detailed R...	Project	All Emails Sent Detailed Report
	Current Project - All Emails Sent Summary ...	Project	All Emails Sent Summary Report
	Current Project - All Files Report	Project	All Uploaded Files Report
	Current Project - All Project Users	Project	All Project Users
	Current Project - All Uploaded Files with Sh...	Project	All Uploaded Files with Sheet Sizes
	Current Project - Checklist Report (Not Met It...	Project	Checklist Report (Not Met Items Only)
	Current Project - Checklist Report	Project	Checklist Report (Met and Not Met)
	Current Project - Department Review Status	Project	Display Departments Assigned to Review and the Status
	Current Project - Entered (last 30 days)	Project	Entered (last 30 days)
	Current Project - Entered (last 7 days)	Project	Entered (last 7 days)
	Current Project - Files Viewed (last 30 days)	Project	Files Viewed (last 30 days)
	Current Project - Folders Entered (last 30 da...	Project	Folders Entered (last 30 days)
	Current Project - Folders Entered (last 7 days)	Project	Folders Entered (last 7 days)
	Current Project - Project Markups Listing	Project	All File Markups Listing
	Current Project - Task Time Report	Project	Task Time Report
	Current Project - Unpublished Files	Project	Unpublished Files
	Current Project - Workflow Routing Slip	Project	Workflow Routing Slip

**Reports Tab**

Reports showing emails, check-lists and project markup listings.

Also the Workflow Routing Slip report shows where in the process the plan sits